Global Survey of Communications Measurement 2009 – Final Report

By

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http://www.benchpoint.com/summit.pdf

Contents

Management summary

The "Global Survey of Communications Measurement" is a non-profit research project that provides valuable insights on development in the growing area of evaluating public relations and communication management. It builds on a previous survey run in 2004 (Wright/Gaunt 2004; see www.benchpoint.com/ download/report.pdf). The survey has been carried out by Benchpoint for the International Association for the Measurement and Evaluation of Communication (AMEC) and the Institute for Public Relations (IPR) in conjunction with the First European Summit on Measurement, which was held in Berlin in June 2009. The survey was conducted online with support from professional associations worldwide. Results are based on a sample of 520 PR professionals. The data does not support analysis of national or regional differences.

Key findings were:

• The overwhelming majority of PR professionals, 88%, believe measurement is an integral part of the PR process (70% believe this strongly).

• While 77% of respondents claimed to measure their work compared with 69% in a similar survey five years ago, the survey results show that the PR profession are still not agreed on the best tools and methodologies.

• Measuring ROI (return on investment) on communications is viewed as an achievable goal by the overwhelming majority of professional communicators taking part in the survey.

• PR Professionals still tend to judge their success criteria more by their ability to place material in the media rather than on the impact such coverage might have on shifting opinion, awareness, or moving markets, although there is evidence that this is changing.

• The survey found that the tools used by PR professionals includes press clippings – still the favourite – closely followed by AVEs (Advertising value equivalent) and more rigorous tools including Internal Reviews, Benchmarking, and the use of specialist media evaluation tools. Various forms of opinion polling and focus groups also remain as popular tools.

• Main criteria used for evaluating the effectiveness of external communication is hitting the target media (20%, rank 1), followed by message output and being on time/budget (16% each, rank 2). Measuring awareness/image, client satisfaction and achievement of goals each get a 15% approval by respondents.

• Overall, the data indicates there are two camps – the output measurers (clippings and AVEs) and the outcome measurers who tend towards more cerebral – and costly – measures (internal reviews, opinion polls etc.).

Methodology, survey responses and demographics

The survey was based on a questionnaire with 31 questions, based on previous research and industrial insights. Most parts of the questionnaire were adapted from the former survey (Gaunt/Wright 2004) which allowed for comparisons. The online questionnaire was made available from May 1 until June 5, 2009, in five different languages (English, French, German, Spanish, Portuguese), with translations made available by members of the research team. PR professionals worldwide were invited to participate by e-mails and announcements distributed online by professional organizations like the German Public Relations Association (DPRG), CIPR, ICCO, Global Alliance, EACA, and PRCA.

The research team offers special thanks for this most valuable support. As the survey was self-recruiting and the overall population for PR practitioners worldwide is not known, this research cannot claim to be globally representative.

Total responses

2009: 520
2004: 1,043

This reflects the different methodology for collecting responses. In 2004 Benchpoint mailed many respondents personally and followed up with a reminder. This year we were at the mercy of the many professional associations, websites, forums and blogs who co-operated. A typical Benchpoint survey to a targeted mailing list with personal e-mail-addresses gets a response of at least 25% and up to 98% for interest or organisation-specific surveys or measurements. Research in the professional field of public relations on a global level is restricted by the fact that there no databases with personal contacts of the relevant population available.

Country response

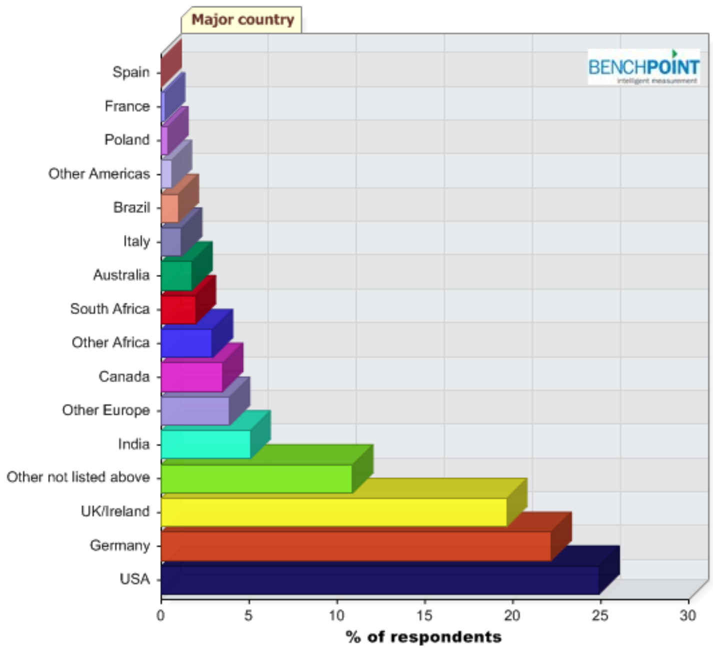
Table 1. Responses from major countries

USA	128	25
Germany	112	22
UK/Ireland	101	20
India	26	5
Other	144	28
Total	511	100

Source: Benchpoint

The largest response was from the USA, followed by Germany, the United Kingdom/Ireland. India and Canada also figured. Nevertheless, the numbers for individual countries are quite small and we would therefore treat demographic samples with caution when analysing data. National differences in responses to certain questions tend to follow the demographics of the total sample.

Response from all countries



92% of respondents describe themselves as “Professional Communicators”, spending 80% or more of their time on communicating or measuring activity.

85% work for large organisations with national or international coverage.

40% have a degree in communication, 18% hold a professional diploma. 25% have no formal education in PR or communication. Nearly half (48%) say they have received formal education in research or measurement.

We can say with certainty that the respondents of the survey believe strongly in the measurement philosophy and are closely involved in measurement. So the data is very powerful and persuasive when it comes to analyzing particular attitudes to evaluation criteria, tools and techniques, and this is where the strength of the survey lies rather than in its ability to determine geographical, hierarchical or sectoral differences.

The consistency in answers from one survey to the next, and within this survey itself, gives confidence in the survey questionnaire and the overall validity of the methodology.

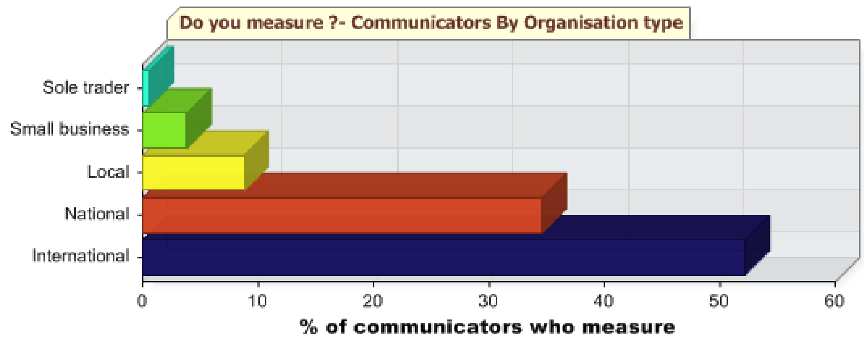
We have made comparisons with the previous survey where we think these are valid. After a gap of five years, and bearing in mind the major changes which have taken place in the profession, there is no suggestion that we have surveyed the same audience. What we have is a snapshot of the opinion of two generations of professional communicators, and, in a sense, it make comparison between the two surveys more interesting.

Measurement as part of the PR process

More people say they are measuring

Do you measure?
2009: 77%
2004: 69%

As one might expect, measurers tend to be concentrated in larger international organisations with national or international reach (87%). 44% of measurers are in the Communications business, which includes PR consultancies, the largest single sector represented by the survey.

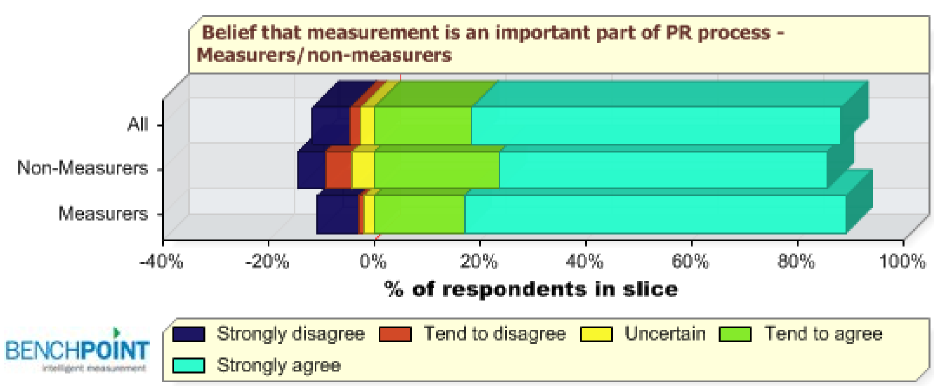


We cannot claim this sample is representative of the PR profession as a whole – more like "77% of PR professionals who were interested enough to participate in a survey on PR measurement said they measured their effectiveness". The 10% increase since 2004 is a crude indication that more people are measuring PR effectiveness than before.

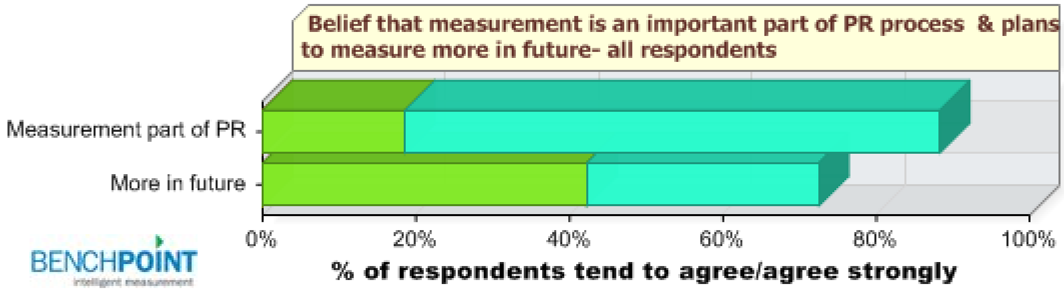
Growing belief that measurement is an important part of the PR process

2009: 70% agree strongly, 18% tend to agree
2004: 61% agree strongly, 26% tend to agree

This belief is held equally by measurers and non-measurers.



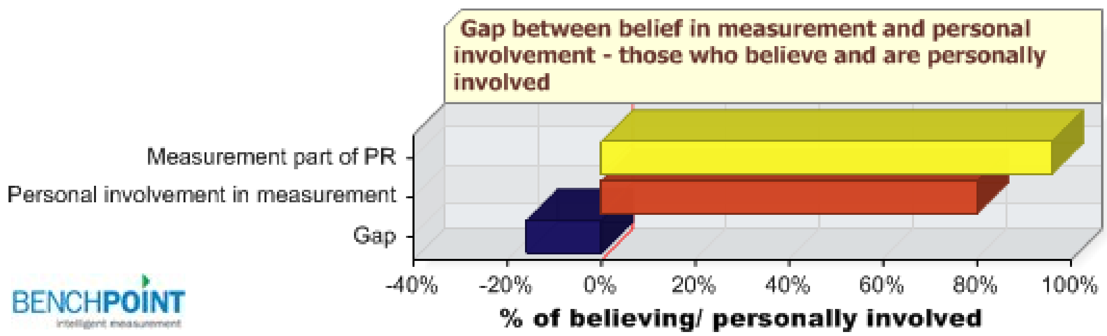
Doing more measurement and evaluation



2009: 31% agree strongly, 42% tend to agree
2004: 27% agree strongly, 44% tend to agree

Personal involvement in measurement is also growing

2009: 34% very involved, 33% quite a lot involved
2004: 23% very involved, 34% quite a lot involved



The gap between belief in measurement and personal involvement is still the same (2004: 16%, 2009: 15%).

External communications – criteria and tools

89% of respondents were external communicators. Those who evaluated external communications use a variety of criteria to assess the effectiveness of their activities.

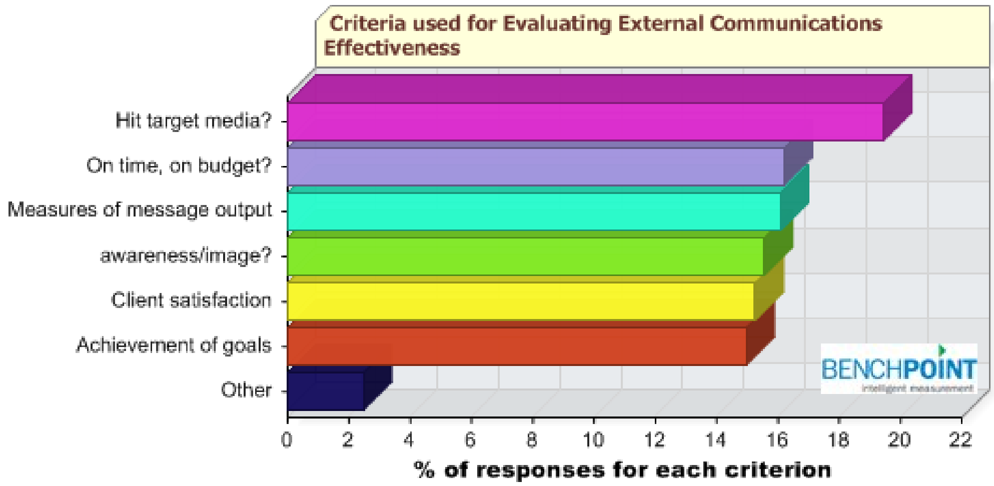


Table 2. Measurement criteria and ranking 2009

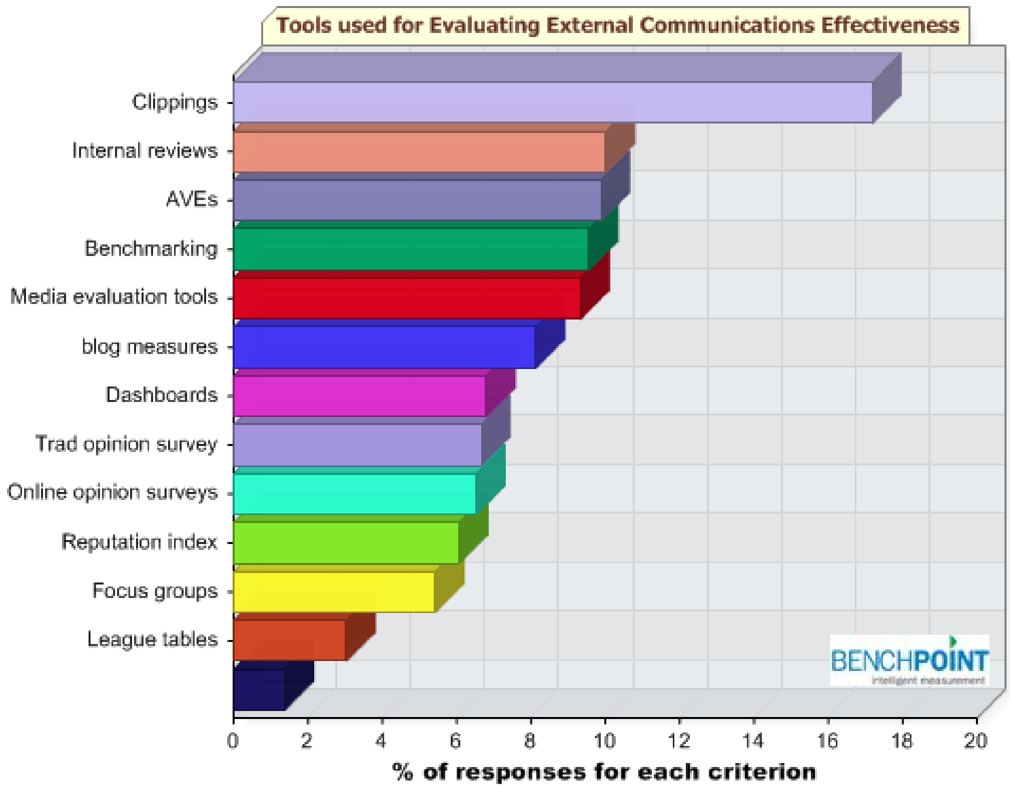
Criterion	%	Position
Hit target media	20	1
On time, on budget	16	2=
Measures of message output	16	2=
awareness/image	15	4=
Client satisfaction	15	4=
Achievement of goals	15	4=
Other	3	7

Source: Benchpoint

This is a multi choice question which attracted nearly 1,600 responses. So respondents clearly use more than one criterion. We are a long way from a universally accepted methodology.

Tools used for evaluating external communications effectiveness

If PR professionals can't agree on what constitutes success, then it is no surprise that they can not agree on what tools to use, or which are the best.



This is another multi question. It attracted over 2,000 separate responses, so, on average each respondent voted for four tools, and two respondents voted for them all. As we observed before, and will see again later, the jury is still out on methodology.

For what it's worth, clippings come in at Number 1. No surprises, and if we'd asked the same question last time, the answer would have been the same. AVE's (Advertising Value Equivalents) are Number 3 compared with 5 in 2004, but with the same per cent of responses. Internal reviews and benchmarking have each dropped one position, with a lower share. Media Evaluation tools have dropped down three places, from 2 to 5 with a lower share. Opinion polls are much the same, but focus groups have dropped sharply from rank 4 to 11, with a corresponding drop in users from 12% to 5%. Reputation rankings, a new entrant this time, barely made it into the "league table."

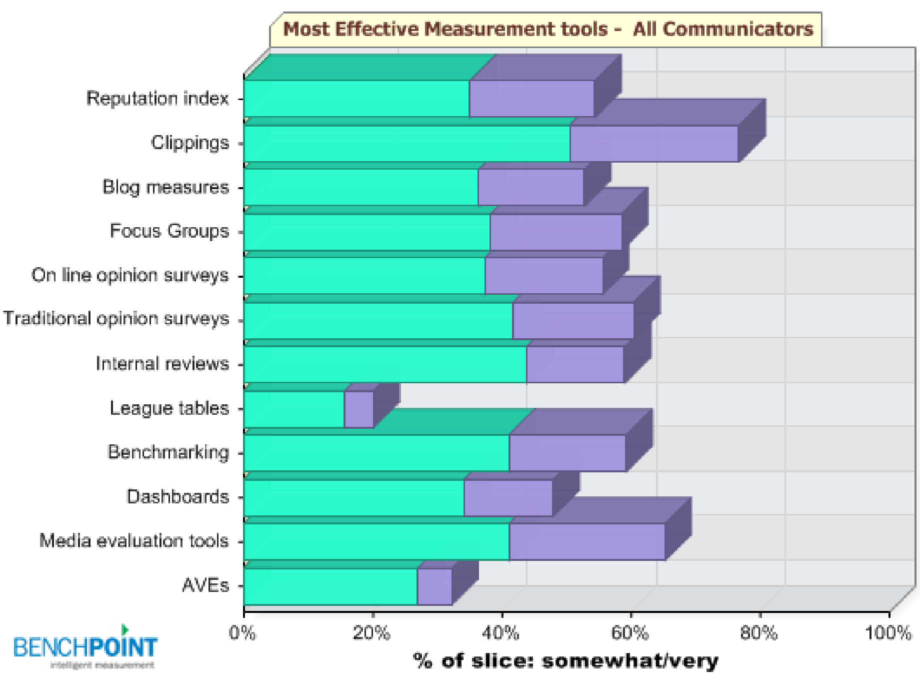
Table 3. Measurement tools and ranking 2009

	2009		2004	
Tool	%	Pos	%	Pos
Clippings	17	1	n/a	
Internal reviews	10	2	10	5
AVEs	10	3	17	1
Benchmarking	10	4	14	3
Media evaluation tools	9	5	15	2
blog measures	8	6	n/a	
Dashboards	7	7	6	7
Traditional opinion survey	7	8	8	6
Online opinion surveys	6	9	n/a	
Reputation index	6	10	n/a	
Focus groups	5	11	12	4
League tables	3	12	4	8
Other	1	13	3	9

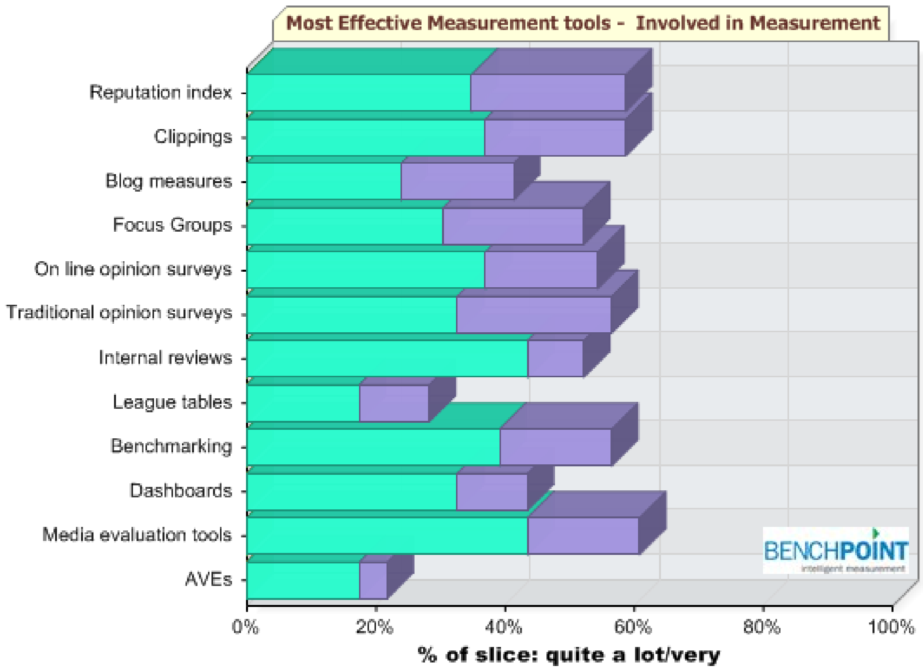
Source: Benchpoint

The effectiveness of external communications evaluation tools

No single tool scored more “very effective” votes than “somewhat effective” votes, which indicates that in the minds of respondents there is still considerable work to be done in defining and refining evaluation tools, which is good news, and a challenge, for those specialized in the field.



If we look at the same chart again for those who are personally involved in measurement we see that approval ratings for many tools have dropped (For example clippings have reduced from an overall approval rating of 78% to less than 60% and that the differences between the various tools have narrowed.



Comparison of satisfaction ratings with previous survey

Table 4. Effectiveness of measurement tools and ranking 2009 (all communicators)

	2009	
Tool	**%**	**Rank**
Clippings	77	1
Media evaluation tools	66	2
Traditional opinion surveys	61	3
Benchmarking	61	4
Focus Groups	59	5
Internal reviews	59	6
On line opinion surveys	55	7
Reputation index	55	8
Blog measures	54	9
Dashboards	48	10
AVEs	35	11
League tables	20	12

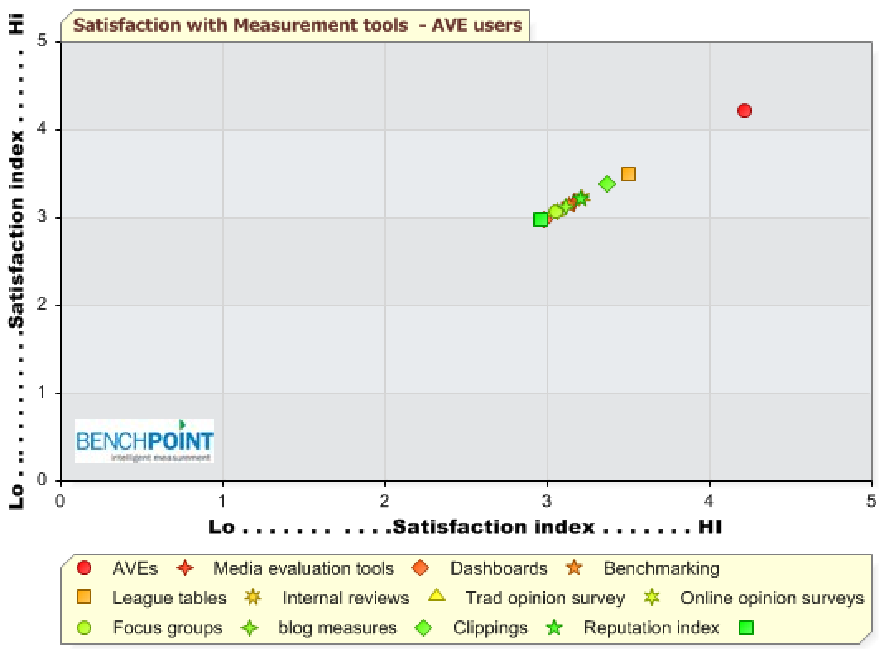
Source: Benchpoint

Clippings are Number 1 and we have no reason to believe it would not have been leading last time if the question would have been asked. Media evaluation tools remain at Number 2, with a higher approval rating. Opinion surveys have dropped from Number 1 to 3 with an eight point drop in approval, and benchmarking takes a five point drop.

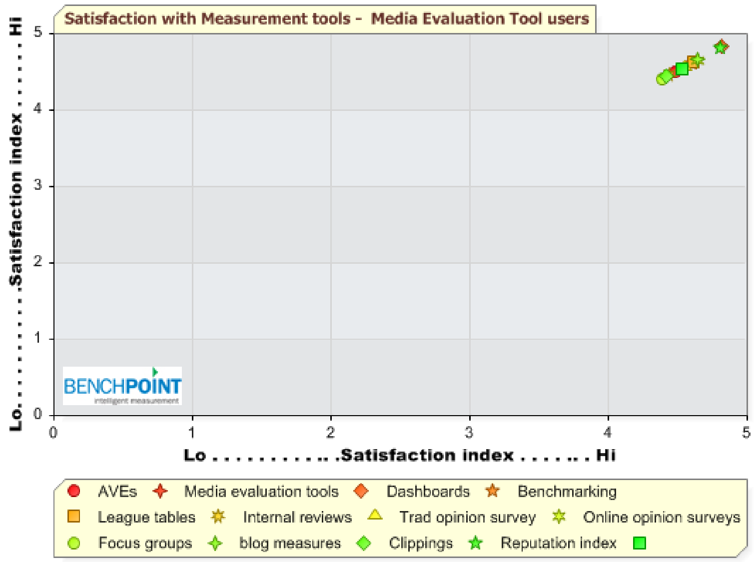
What is significant here is not so much the position shift, but the shift in approval ratings. Dashboards have come up from 30% to 48%; even AVEs have managed to gain a few percentage points.

Another interesting way of looking at the data is to compare the satisfaction scores for each tool given by people who said they used that tool with their scores for all the other tools they said they used.

On the next chart the horizontal and vertical axes both plot satisfaction for AVE's by the people who said they used them, and the dots represent the score for other tools this group of people said they actually used. Greater satisfaction is indicated when he dot is placed higher and to the right.

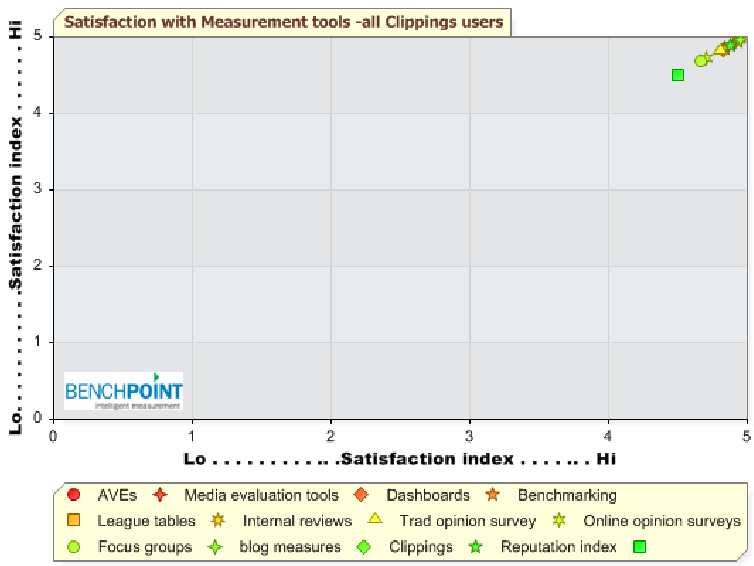


The red dot at top right is AVE's. This means: respondents who said they used AVE's voted it their favourite – by a particular margin. This group also likes League tables, clippings and internal reviews.



The dots for Media Evaluation Tools are much closer together, indicating that those who said they used Media Evaluation Tools are pretty satisfied with all their toys. The Media Evaluation Tools user prefers media evaluation tools, but by a very small margin. They also like Reputation ranking, blog measures and league tables. So we are also beginning to get an idea of what kind of people they are, too.

As one might expect, the Benchmarkers like League tables and reputation rankings, and are least impressed with clippings. The dashboard user also dislikes clippings. The League Tablers like league Tables. Clippings come last. The internal reviewer's favourite tool is the Internal review, followed by league tables and dashboards. Those who say they use traditional opinion surveys say their favourite tools are Focus Groups, followed by on line surveys. But the on line surveyors prefer traditional opinion surveys followed by focus groups. Focus group users like opinion surveys of either type.



Clippings users like pretty much everything. But their favourite tools are AVE's and league tables, which at least answers the question "how do people use their clippings?"Clippers are quite keen on blog measures and internal reviews, less keen on focus groups and opinion surveys.

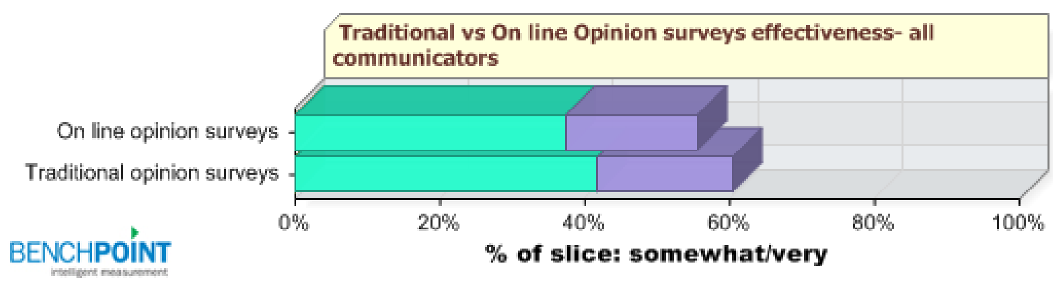
How can we sum all this up objectively? None of these tools users are discrete groups existing in a vacuum. The question "What tools do you use?" was a multi-choice question, so participants will have chosen up to 13 tools, and as we saw earlier, the responses indicate an average of four tools per respondent.

The data suggests there are two camps – the output measurers (clippings and AVEs) and the outcome measurers who tend towards more cerebral – and costly – measures (internal reviews, opinion polls etc).

Additional points of interest on external communications tools

Opinion surveys have taken a slight knock in popularity, but they still have an overall approval rating of 60% with 19% of respondents saying they are very satisfied. There has been a proliferation of on line survey systems, including self-service players like Survey Monkey which allow anyone to knock up a survey and send it out, no matter how badly it is done and how skewed that data is. This is a source of malpractice and should be avoided.

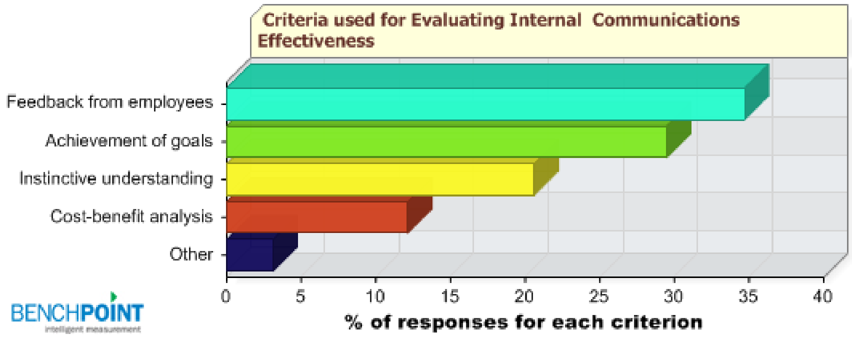
This survey asked for approval ratings for traditional surveys and on line surveys. Both scored the same "very effective" rating of around 19% with on line slightly out in front by a few decimals. However 7% more respondents are "somewhat satisfied" with Traditional surveys than on line surveys. The jury is still out.



Internal communications – criteria and tools

68% of respondents were internal communicators. They use a variety of criteria to assess the effectiveness of their activities.

Internal communications criteria



These remain the same as the last survey. There has been a small reduction in people relying on "instinctive understanding" as a measurement criterion.

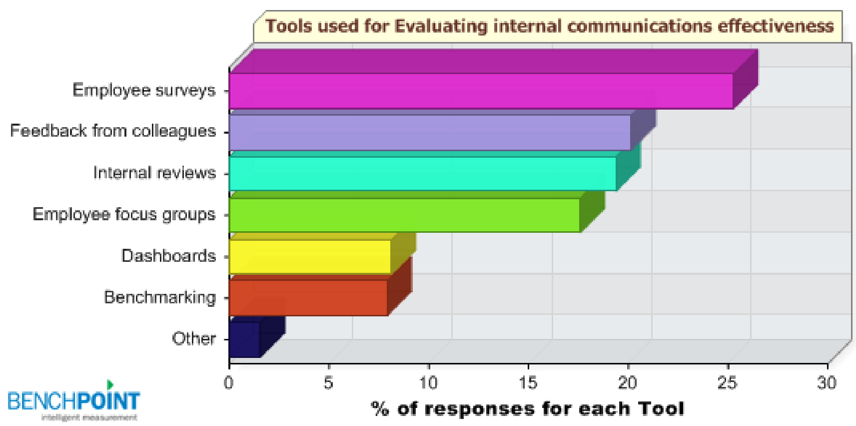


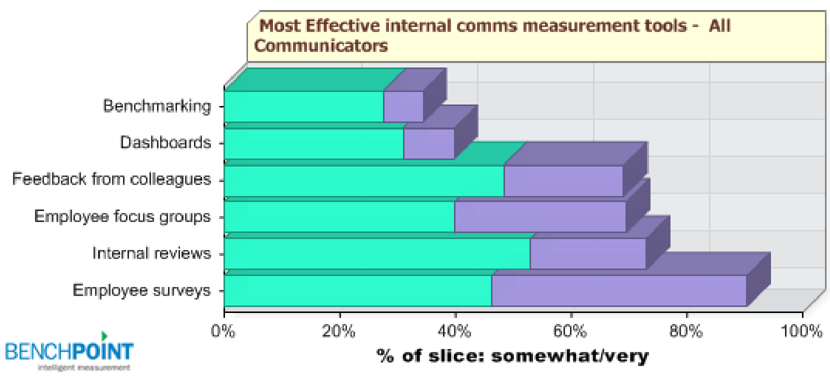
Table 6. Internal measurement tools and ranking 2009

	2009	
Tools	**%**	**Rank**
Employee surveys	25	1
Feedback from colleagues	20	2
Internal reviews	19	3
Employee focus groups	17	4
Dashboards	9	5
Benchmarking	9	6
Other	2	7

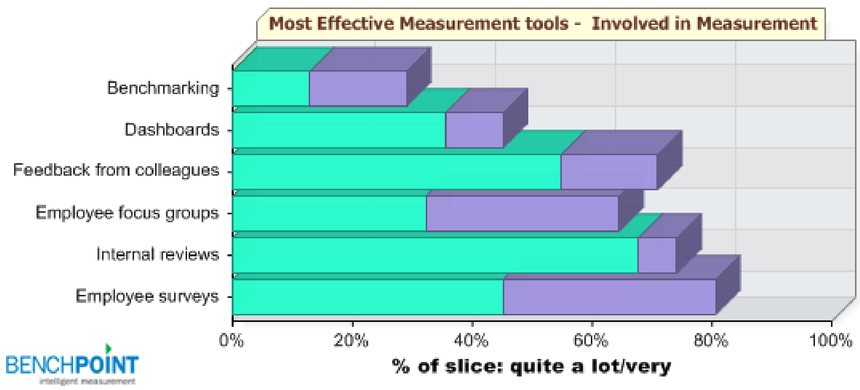
Source: Benchpoint

Employee surveys remain at number one. They are simple, effective and the cost has tumbled. And there are no significant changes in rankings or percentages from the previous survey.

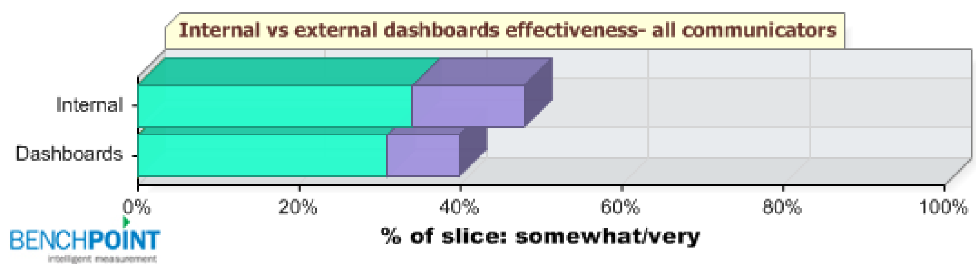
Effectiveness of internal communications measurement tools



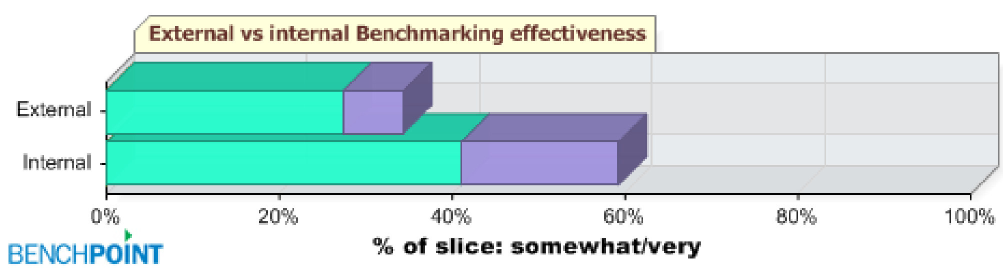
Employee surveys, internal reviews, feedback from colleagues and focus groups all get strong approval ratings. However, and unlike external communications, if we look at those who claim to be personally involved in measurement, approval ratings between the various tools vary sharply.



"Very satisfied" ratings for internal reviews and feedback from colleagues go down – it would appear the hardened pro prefers rigorous measurement to waffle-filled meetings. "Very effective" ratings for benchmarking and dashboards are up for this group, and there is also greater support for Employee surveys and focus groups.

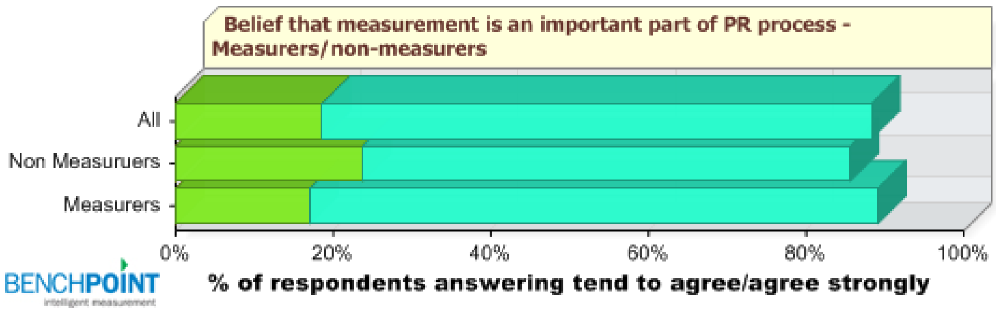


Dashboards appear to enjoy a slightly higher rating for internal communications than they do for external communications. And so does Benchmarking, as displayed in the next picture.



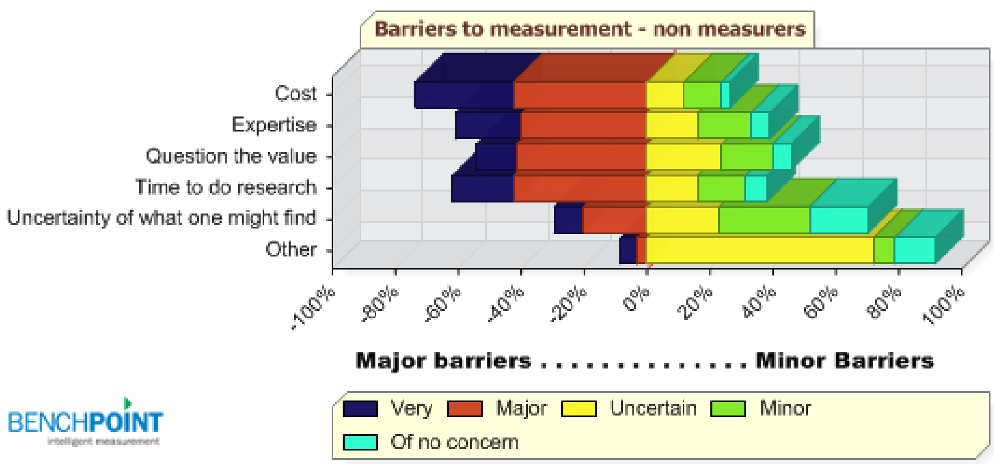
The Non-Measurers

Measurers and non-measurers alike unanimously and strongly agreed that measurement is an important part of the PR function.



So why do non measuring professionals not measure?

Nothing much has changed since we last asked this question. While the non measuring population has reduced from 31% to 23% of respondents, a significant decrease, the reasons for not measuring and the numbers holding these views has not changed since the last survey.



As one might expect cost – or perceptions of cost – are the biggest barrier, with 31% of non measurer respondents believing it is a "very major" barrier and 42% believing it is a major barrier. That's over 70% of non-measurers. Lack of time is next, followed by lack of expertise, and the fear that others (senior management, other departments) will question the value. Fear of the unknown –"Uncertainty of what one might find" – does not appear to be a particularly major issue.

Some of the minority reasons given provide food for thought:

- "It is not the value of research that is questioned; rather the value of particular methodologies ... the cheap; easy options have little value ... the more sophisticated options are expensive."

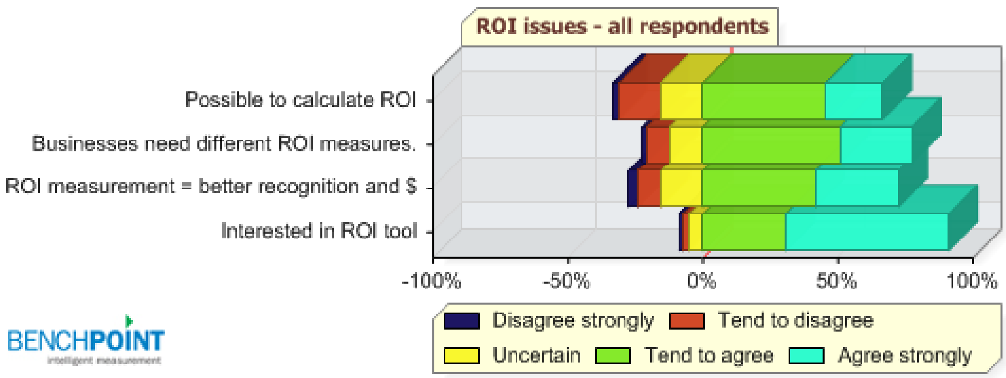
- “Client inability to agree clear method of measuring outcomes.”
- “Missing standards; missing knowledge regarding the use of established methods.”
- “Clients are not prepared to undertake research and prefer instead to use available budget on promotion rather than measuring.”
- “Lack of understanding, knowledge and experience within senior management, which does not ask for evaluation or does not take time to consider the value of communication.”
- “Companies that use metrics have no respect for their PR function. This kind of measurement is usually only the territory of very poor PR people who have trouble impressing upon their clients the value of their work.”
- “Exposure of Professional Incompetence”, “Fear of exposure.”
- „Fear of too much transparency.“
- “Internal politics; such work seems to have to support management opinion rather than disclose reality.”
- “No demand. Management values and believes in communications. Measurement of communications does not much capture the interest of C-suite executives.”

The measurement debate – where do we go from here?

This report is taking on a philosophical tone, which brings us neatly and punctually to some vital questions – Where is measurement going? Will we ever be able to demonstrate ROI and so capture the enthusiasm and budgets we all crave?

ROI – Can PR professionals measure it and use it to help develop their roles, status and value within the organisations they work for?

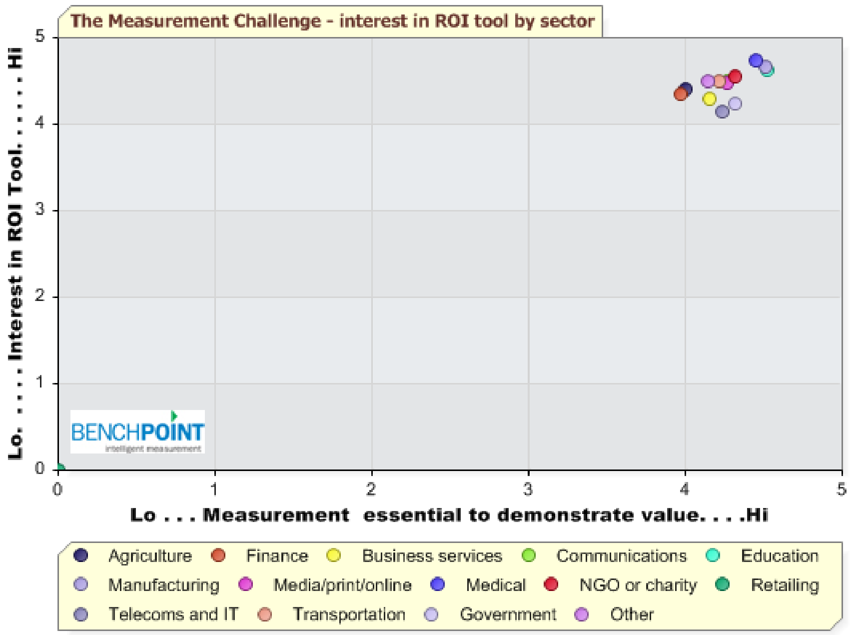
The survey respondents believe so.



There is strong agreement that it is possible to calculate ROI on communications, businesses need different ROI Measures, and demonstrable ROI means better recognition and bigger budgets. And there is overwhelming interest in a workable ROI calculation tool. Compared to the 2004 survey, the hunger for a workable ROI methodology is even greater. That is the challenge for the media evaluation and measurement industry.

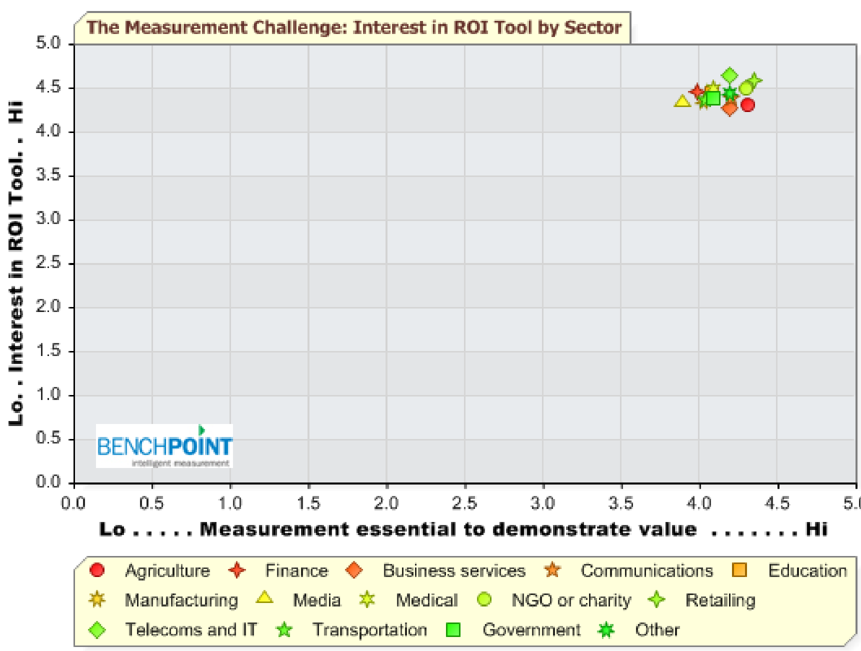
This chart below spells it out graphically. The vertical axis plots interest in a ROI Tool. The Horizontal axis plots belief that measurement is essential to demonstrate value. So the higher and farther to the right you go, the stronger the interest in measuring ROI and the belief that measurement can demonstrate value. And each little dot on the chart represents the different business sectors covered by this survey. You can see them all clustering in the top right corner. An opportunity if ever there was one.

2009 survey – interest in ROI measurement



This would be very exciting were it not for the fact that five years ago our previous survey showed exactly the same exciting future awaited the industry, as displayed below.

2004 survey – interest in ROI measurement



Since then we have seen the emergence of some very potent measurement and evaluation companies as well as AMEC as their umbrella organisation. So while it appears that nothing has been happening, the reality is that a lot has been going on under the surface. Moreover, academic research and discussions on value links of communication and valuation of intangible assets has shown that the search for an overall ROI formula might be misleading. In competitive environments, organisations have quite different set of stakeholders and goals. As a consequence, communication may contribute to overall goals in quite different ways, which asks for varying measures of effectiveness linked to the unique strategy.

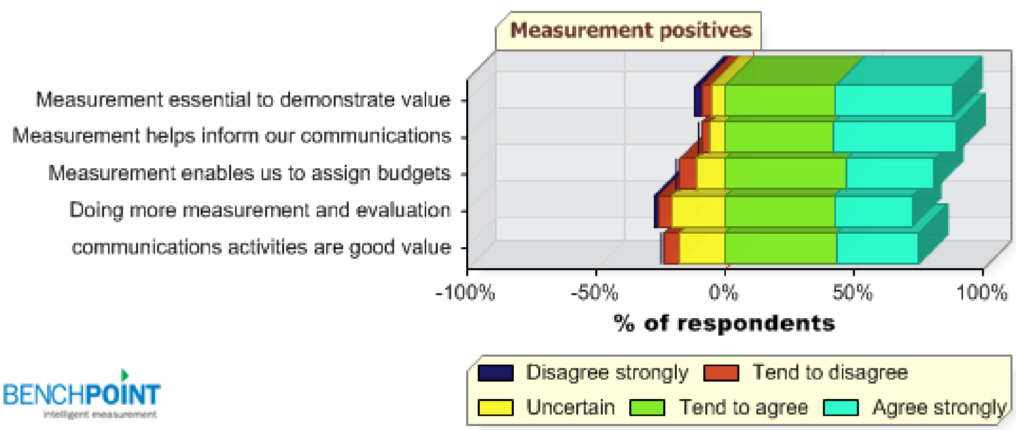
Positive statements about measurement

The survey asked a number of qualitative questions at the end. These were to get an idea about how respondents *feel* about measurement, and put the answers to other questions into some sort of context.

The chart shows what we call the Measurement positives – Respondents believe, unanimously and strongly that

- Measurement is essential to demonstrate value (45% agree strongly),
- Measurement helps inform our communications (48% agree strongly),
- Measurement helps us to assign budgets (34% agree strongly),
- Communications activities are good value (32% agree strongly),

- Doing more measurement and evaluation in the future (30% agree strongly).



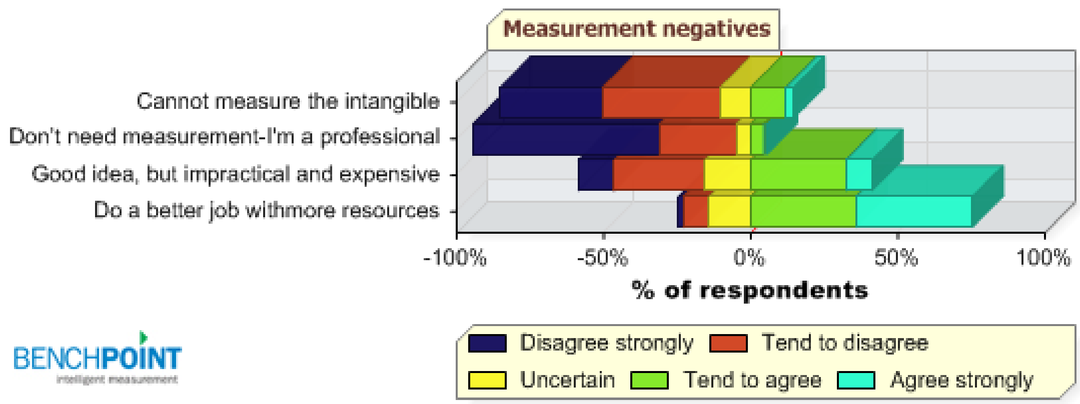
Measurement negatives

We also asked some questions where disagreement with the statement is good for the measurement cause. 46% disagree strongly with "You cannot measure the intangible" 37% tend to disagree. Only 10% are uncertain. 64% disagree strongly that "I don't need measurement –I'm a professional"

Is measurement practical?

We asked respondents to agree or disagree with the statement "Measurement is a good idea, but it's impractical and expensive".

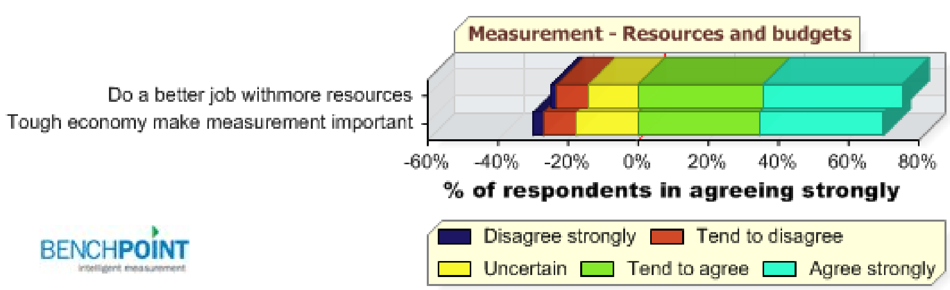
The jury is out on this one 12% disagreed strongly, 31% tended to disagree. 16% were uncertain 32% tended to agree and 9% agreed strongly.



Finally, two loaded questions asked:

Would you do a better job with more resources? Of course, who wouldn't? Well 10 per cent are uncertain and 9% tend to disagree. A tiny minority, 2%, disagrees strongly.

Do tough economic conditions mean that measurement is becoming more important? 35% agreed strongly, 35% tends to agree, 17% are uncertain , 9% tends to disagree and 3% disagree strongly.



Main conclusions

- More people are measuring communications effectiveness than ever before, and more people are personally involved in measurement.
- There are more “somewhat satisfied” than “very satisfied” for external communications tools, which indicates there is much more work to be done to define and refine these tools.
- There are no clear winners when it comes to particular tools. Each one has its adherents There is still no clear consensus on measures or methodology.
- Evidence that people are moving more to measuring outcome rather than output, reversing the pattern in the 2004 survey.
- Clippings the number one measurement tool, in terms of use and satisfaction.
- Opinion polls and benchmarking are less popular than before. Media evaluation tools and dashboards are rising in popularity. Even AVEs have gained a point or two.
- Approval ratings for all tools reduces for those who are personally involved in measurement, suggesting again that better definitions and refinements are required.
- No significant difference in approval ratings for traditional surveys and on line surveys.
- Internal communications are easier to measure and monitor. Employee surveys remain the number one measurement tool in terms of use and popularity.
- People who are personally involved in measurement prefer rigorous tools like benchmarking and dashboards, as well as employee surveys.
- Dashboards and Benchmarking have higher ratings for internal communications measurement.
- Cost and time remain the major barriers to measurement. The industry needs to work harder to demonstrate tangible cost benefits from measurement activity.
- Both measurers and non-measurers share the strong belief that measurement is an important part of the PR function.
- There is strong belief that ROI on communication can be measured, and there is universal interest in the Holy Grail – a workable ROI measuring tool. This is the same as five years ago.
- Opinion remains divided on whether measurement is good, or impractical and expensive – another challenge for the industry.
- Almost everyone believes that they would do a better job with more resources.

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